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ABSTRACT

This guidebook is part of a series of publications about public/private partnerships. The guidebook has a three-fold goal: (1) Spark the aging network's interest in developing and expanding public/private partnerships in volunteerism; (2) Provide guidance on how to create such partnerships; and (3) Share examples of partnerships that other aging network organizations have tried. The book is organized into four chapters. Chapter 1 introduces the world of volunteerism partnerships and the benefits of these arrangements. Chapter 2 discusses the types and ranges of partnership formats, while chapter 3 looks at the challenge of enlisting volunteers to work with seniors and describes the steps involved in designing a partnership strategy. Chapter 4 provides fuller descriptions of some of the successful partnerships in volunteerism. Although the majority of examples used throughout the guidebook are of programs and partnerships with businesses, much of the information and advice can apply to other potential partners, including schools, religious institutions, educational, professional and trade associations. Although not inclusive in its material, the guidebook should stimulate those in the aging network to develop their own initiatives and programs. Three appendices offer information on additional resources, sample volunteer forms, and the book's authors. (RJM)

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A GUIDE FOR THE AGING NETWORK

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PUBLIC/PRIVATE PARTNERSHIPS IN VOLUNTEERISM

A GUIDE FOR THE AGING NETWORK

By The Chicago Department on Aging
The National Council on the Aging, Inc.
The Washington Business Group on Health

December, 1992

Washington Business Group on Health
National Eldercare Institute on Business and Aging
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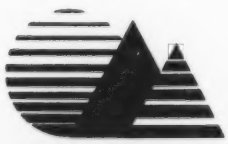

Older Americans Act
NATIONAL ELDERCARE CAMPAIGN

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Acknowledgements

Welcome to *Public/Private Partnerships in Volunteerism*, one in a series of five guidebooks on partnerships between aging agencies and business. This guidebook was produced under the auspices of the National Eldercare Institute on Business and Aging, a cooperative initiative of the U.S. Administration on Aging and the Washington Business Group on Health.

The purpose of the guidebook series is to provide practical information to assist state and local aging agencies in developing strategic relationships with businesses in their communities. In addition to this guidebook on volunteerism, other topics covered in this series include health promotion, older worker employment, and corporate eldercare, as well as overall partnership strategies.

The authorship of this guidebook was very much a group effort. First drafts were prepared by Mary Brugger Murphy, Project Coordinator, of the National Council on the Aging and Catherine Grochowski, Assistant Specialist in Aging, of the Chicago Department on Aging's Planning Department. They were assisted in developing case studies for the guidebook by Alexandra Lyons, Director of Volunteer Programs for the Chicago Department on Aging. Review and editing was provided by Sally Coberly, Ph.D., Associate Director of WBGH's Institute on Aging, Work and Health.

The Washington Business Group on Health would like to extend its appreciation to the many individuals and agencies whose generous contributions brought this project to fruition, especially the Chicago Department on Aging which served as the host agency for the development of a Task Force of Chicago-based employers and social service agencies that helped to shape and review the guidebook. (Appendix A contains a list of Task Force members.) Ultimately, we are indebted to all of the "partners in action"—those in the aging network and private industry who were willing to share their time and tell us about their experiences with volunteer partnerships.

Special appreciation is extended to Commissioner Joyce T. Berry, Ph.D., and her staff at the U.S. Administration on Aging for giving us the means and encouragement to complete this work.

Robert C. Levin
Director
National Eldercare Institute on
Business and Aging
Washington Business Group on Health

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Preface

This guidebook is one in a series of publications about public/private partnerships. It was prepared in conjunction with the Washington Business Group on Health in its role as a participant in the U.S. Administration on Aging's National Eldercare Campaign.

The goals of this guidebook are:

1. To spark the aging network's interest in developing and expanding public/private partnerships in the area of volunteerism.
2. To provide guidance on how to create such partnerships.
3. To share examples of partnerships that other aging network organizations have tried.

In keeping with these goals, the guidebook is organized into four chapters. Chapter 1 is an introduction to the world of volunteerism partnerships and the unique benefits of these arrangements. Chapter 2 discusses the types and range of partnership formats. Chapter 3 looks at the challenge of enlisting volunteers to work with seniors and describes the steps involved in designing a partnership strategy. Chapter 4 provides fuller descriptions of a few of the many successful partnerships in volunteerism.

Three Appendices are included: Appendix A lists the members of the Chicago Task Force that helped develop and review this guide; Appendix B lists additional resources on volunteerism and public/private partnerships; and Appendix C provides sample volunteer forms developed by the Atlanta Regional Commission, the Area Agency on Aging.

Although the majority of examples used throughout the guidebook are of programs and partnerships with businesses, readers may want to note that much of the information and advice is applicable to other potential partners, including schools, religious institutions, educational, professional and trade associations.

This guidebook is not intended to be all-inclusive. Rather, it is intended to be used as a stimulus for those in the aging network to develop their own initiatives and programs, in response to their own unique situations.

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Chapter 1

Public/Private Partnerships in Volunteerism

In Chicago, the Department on Aging faxes a description of volunteer opportunities to the Park Hyatt Hotel where those jobs are matched with suitable employee-volunteers.

In Connecticut, experienced corporate attorneys employed by Aetna Life and Casualty provide free legal services to eligible older Americans.

In Little Rock, Arkansas ABLE, an organization devoted to promoting the employment of older workers, uses the corporate members of its Board of Directors to provide management assistance that ranges from developing personnel policies to conducting team-building workshops for staff.

In Delaware, MBNA America Bank employees volunteer their time to deliver meals under the Newark Senior Center Meals-on-Wheels program.

In Louisville, more than 700 General Electric Appliance Division retirees provide assistance to more than 40 community agencies, including several that provide direct services to older adults.

As these examples suggest, corporate volunteers—both active employees and retirees—are a valuable asset to the aging network. And, since public resources are stagnating or shrinking while the older population expands in numbers, needs and expectations, the role for volunteers in aging programs will continue to grow. Indeed, corporate volunteers may become an increasingly important resource to help maintain older persons in the community by providing services directly and/or by providing manage-ment expertise to agencies in the aging network.

Business Involvement in Volunteerism

In the past several years, businesses have taken a greater interest in promoting volunteerism among their employees and retirees. Part of this interest has come from a recognition that public and non-profit agencies that provide services in the community can benefit from the assistance of volunteers from businesses. In addition, businesses are becoming increasingly aware that volunteerism makes "business sense" as well.

"...companies are motivated to participate in partnerships by both a sense of corporate citizenship and by self-interest."

A New Competitive Edge

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Benefits

to Individual Employee Volunteers

- Develop new job skills.
- Explore a new career.
- Make professional/business contacts.
- Relieve job monotony.
- Have an impact on a community problem.
- Help others.[2]

For example:

- Volunteer programs are a way for corporations to respond to workers' concerns about the quality of life in their working and living environments.
- Volunteer programs are a way to increase and reinforce workers' skills, particularly in leadership and participatory decision-making.
- Volunteer programs are a way for business to respond affirmatively to the public's expectation of its involvement in community problem-solving.
- Volunteer programs are a way for corporations to demonstrate moral leadership—"doing the right thing"—which ultimately can benefit the company.
- Volunteer programs are a way for companies, often without a major financial investment, to make an impact on their communities.[1]

Also of major significance are the benefits to the individual employee.

Corporate Support for Volunteerism

The level of corporate involvement in volunteerism ranges from tacit support to strong encouragement; it can go as far as actually creating volunteer projects for employees.

In 1985, the national organization VOLUNTEER surveyed 600 large companies and compiled results from the 294 that responded.[3] The ways in which corporations were involved in volunteer efforts are highlighted below. Smaller percentages sponsored a clearinghouse, allowed non-profits to recruit, conducted community needs assessments, and established a skills bank. These data suggest that corporate involvement in promoting volunteerism is substantial and that corporate volunteers represent an important, perhaps heretofore underused, resource for the aging network.

Corporate Support for Volunteerism

95% encouraged employees to serve on boards of directors.

84% gave recognition to employees who volunteer.

76% "loaned" people to voluntary organizations and government agencies.

72% involved employees in group volunteer projects.

69% encouraged their retirees to become involved as volunteers.

68% provided information about opportunities.

61% surveyed their employees about their involvement.

60% offered release time for volunteering.

51% gave monetary contributions to organizations in which their employees volunteer.

46% referred employees to agencies that place volunteers.

Retiree Involvement

One of the largest untapped opportunities for volunteer outreach by business is through the participation of retirees. With the growing number of retirees in many communities, businesses increasingly view this population as corporate "ambassadors" in the community; many firms have helped to organize their retirees for the express purpose of encouraging community service functions.

The Rationale for Partnerships in Volunteerism

Public/private partnerships are creative alliances in which public agencies, such as Area Agencies on Aging, join forces with businesses and other private entities to solve problems jointly in more efficient and effective ways than tackling them individually. Like all public/private partnerships, those between the aging network and the private sector seek to create mutually beneficial exchanges whose "wholes" are greater than the sums of their parts. The overriding principle in partnerships is to achieve a "win-win-win" scenario, in which the aging network partner finds new resources, the private partner gets something it wants, and, where applicable, the older adult client is better served.

In volunteerism, the benefits of partnerships to you as a member of the aging network are clear: the person power of a volunteer can be as useful as cash or in-kind contributions used to maintain or expand services to seniors. The benefits for corporate partners may be less obvious, but companies are motivated to participate in partnerships by both a sense of corporate citizenship and by self-interest.[4]

Although these motives seem to be contradictory and mutually exclusive, many companies demonstrate both. Self-interest is a dominant motive for most corporate philanthropy. For example, reasons for contributions include a direct benefit to employees, tax benefits, marketing benefits, and reputation enhancement by the increased visibility associated with the charitable activity. More specifically, participation in partnerships with aging network agencies not only helps companies meet specific program goals, such as providing meaningful volunteer opportunities, but also provides access to the expertise of the aging network in such other areas as eldercare, health promotion, older worker recruitment, retirement transitions, and mature market product development and marketing.

Yet you should not underestimate altruism as a motive for corporate involvement in and contributions to the community. Many companies have long histories and traditions of community support, recognizing that investment in the community is good for their workforce and good for business. Like other philanthropic endeavors, corporate volunteerism programs enable both employees and the company to "do well while doing good."

Thus, you need to recognize that corporations are indeed motivated by both enlightened self-interest and a desire to serve community needs. As an aging agency seeking partnerships, you should be aware of both of these motivations so that you can frame your request for assistance in terms of offering to solve a community problem while giving the private partner visibility for its contributions.

Finally, getting businesses involved in your agency's activities through encouraging volunteerism can be a first step in attempting to secure more direct financial and/or in-kind support. Businesses often feel that they need to establish a "stake" in a community agency before the company is willing to commit charitable resources. Some companies will even give preferential consideration to those groups for whom their employees volunteer.

"In the past ten years, a new contribution from the business sector has emerged—the time, talent and energy of workers, acting individually and collectively, with the encouragement and support of management, in community service projects."

A New Competitive Edge

Chapter 2

Partnership Possibilities: The Range of Corporate Volunteer Programs

Employee volunteer programs take many forms, from brief, one-time encounters with a senior citizen, to an extended, ongoing relationship for visiting and assistance. An employee volunteer program may involve fundraising or technical assistance for a network agency, board participation or other "loaned executive" functions. It may also mean a group of employees participating in a special team activity, such as painting or renovating a home, or sponsoring a recreational opportunity for seniors. Some companies favor one particular type of activity; others will use a variety, depending largely upon the extent of support they can supply in terms of volunteer coordination. Some collect requests from community agencies or local volunteer centers and circulate the information to employees to take the initiative and do everything on their own. Others have become so committed to community service that they offer paid release time to employees for volunteering.

The Range of Volunteer Programs

A review of corporate volunteer programs nationwide shows that many variations are possible, both in terms of the level of corporate commitment and involvement as well as the level of personal involvement. For example, corporate commitment ranges from modest support (such as an executive recommendation that employees become involved in volunteer efforts or posting a notice of volunteer opportunities on an office bulletin board) to more extensive support (such as the establishment of a corporate volunteer office or the provision of paid time for volunteering).

Additional Resources

Searching for partnership ideas? In addition to the examples of public/private partnerships in volunteerism cited in this guidebook, try these three other resources:

Business Leadership in Aging: A Compendium of Program Initiatives from the Administration on Aging and the Washington Business Group on Health.

Public/Private Partnerships: Examples from the Aging Network from the National Eldercare Institute on Business and Aging.

A New Competitive Edge from VOLUNTEERS.

All are listed in Appendix B.

At the employee level, the amount of time committed to a volunteer effort varies, as does the degree of direct, personal involvement. Some employees participate in special once-a-year programs, others have weekly volunteer assignments. You should thus be aware of the many different opportunities that exist for partnerships in volunteerism.

To help organize your thinking about the approach to take in promoting corporate support for volunteerism, consider the four different categories of volunteer opportunities described below. The examples within each category may be one-time-only opportunities, short-term commitments, or ongoing relationships.

The four categories are:

- **Clearinghouses**, or other arrangements, for individual assignments.
- **Group projects** (including employee "teams").
- **Loaned personnel programs** (including board participation).
- **Retiree programs**.

The Clearinghouse

A business takes the clearinghouse approach to volunteerism when it assumes the responsibility for matching employees (or retirees) with volunteer opportunities in the community. Even an organization with a limited interest in volunteerism can post a list of opportunities and allow its employees to take advantage of them. When the business assumes a clearinghouse function, however, it greatly facilitates employee volunteerism.

In a clearinghouse model, screening, placement, and follow-up are necessary for both partners. Carefully matching the volunteer and the opportunity may be a time-consuming effort, but this is the type of partnership that allows you to provide direct, needed services to clients, clients who would otherwise not receive the service—a friendly visitor, chore services, or shopping assistance, for example.

The clearinghouse model is typified in a partnership between the Chicago Department on Aging and the Park Hyatt Hotel. When the Department on Aging volunteer coordinator receives requests for services from caseworkers, she faxes descriptions of the clients and the needed services to the personnel office of the hotel. Staff in that office then attempt to match those descriptions with their profiles of employee volunteers. Once matches are made, logistics are arranged and follow-up initiated. As a result, windows are being washed, gardens are being tended, and older people in Chicago who have been homebound and isolated are interacting with others again.

If your agency has a list of volunteer opportunities available in the community you may want to contact directly those businesses known to encourage their employees to volunteer. Or, you may want to approach businesses that don't provide a clearinghouse function for their employees, offering your own "laundry list" of volunteer opportunities directly to employees.

"Do not use volunteers for jobs that are not meaningful. Use them wisely."

Julie Rensel
Hyatt Regency, Chicago

"The me generation of the '80s is becoming the we generation of the '90s. As people become more involved with their communities and others, this becomes a good time to ask for volunteers."

Nancy Beric
Public Relations Assistant
J. Walter Thompson, Chicago

Group Projects

Partnerships that pair an aging organization with a group of corporate volunteers can result in efforts that are larger or more complex in scope than those accomplished through the one-on-one matches made by a clearinghouse. Further, since not all potential volunteers are comfortable with, or interested in, volunteering on a one-on-one basis, another set of needs can be met by volunteers working in groups. In addition to volunteers in groups taking on larger tasks, these partnerships can provide a pleasant and positive introduction both to volunteerism and to older persons.

J. Walter Thompson, an advertising agency, offers its employees a variety of group projects from which to choose for their annual paid day of volunteering. A popular and very useful group activity involves painting apartments in a senior housing unit. At Helene Curtis, specific departments such as finance and marketing adopt a family or a senior at holiday time. Screening, coordinating, making logistical arrangements, and follow-up are necessary with these partnerships as well. Significant support is provided by a staff member in each of these organizations.

One of the most successful examples of a group partnership is the provision of a hot holiday meal to thousands of homebound seniors on Thanksgiving Day through the efforts of Meals-on-Wheels America. Many companies nationwide organize groups of volunteers to provide different services such as fundraising, meal preparation, planning pickup and delivery routes, and the delivery of meals themselves. Often companies will invite elected officials and other local personalities to participate in the "group" activity.

If your agency and its clients could benefit from a voluntary group effort, but the potential corporate partner is unable to provide the essential organizational support, that support may come directly from the volunteers. The "team" approach to a partnership places much of the responsibility for organization and management on the employee volunteers themselves. It is up to the team leaders to recruit members, identify projects, and handle all logistics—often with some overall support from the parent organization.

Federal Express in Memphis, for example, provides its elected team leaders with orientation, a handbook, and listings of community agencies. The teams meet monthly to plan their activities independently of the management of the company. One such team, Expressly Gray, serves older area residents, often through social events and short-term group projects. Such teams can be encouraged in other corporations and offered the opportunity to fill service gaps in partnership with your agency.

Many private partners provide services to the aging through the organization of their employees into community service teams, but one adds another element to this win-win partnership. Minnesota Mining and Manufacturing–3M–uses the successful home-delivery of meals as a team-building activity for its employees.

Loaned Personnel Programs

Loaned personnel programs are a special category of corporate volunteerism in which employees participate as volunteers on company time. These programs can involve "team efforts" as described above, and can be of short or long duration. Release time programs can take a variety of forms. They can be used for established company volunteer programs, such as participation in a health fair or home delivery of meals to seniors, or they can be used for individual responsibilities, such as attending board meetings. Some companies have formal release time policies; The Travelers Companies allow employees up to three paid days per year to serve non-profit organizations.

One especially interesting form of release time is the "social service leave" program. Typically available through large companies, such as IBM and Xerox, these programs allow employees to spend up to six months or a year volunteering with a community agency. Some companies partially subsidize employees who are volunteering, others offer job security for those employees who want a "change of scene," but who intend to return to their job after completing their community service.

Loaned personnel programs can be used to provide skilled, professional, often executive level, staff to a non-profit agency. They can also be used to offer professional services on a *pro bono* basis to organizations or individuals. Possibilities include accounting, legal, public relations, and management services—often services non-profit agencies are hard-pressed to pay for or provide adequately on their own.

Management Assistance Programs

Management Assistance Programs, or MAPs, can provide effective tools for the improvement of operations of aging organizations. MAPs are clearinghouses that link skilled volunteers and professionals with non-profit organizations to strengthen management practices.

More than 150 MAPs have been established across the country, most often within the local United Way system. The first to start a MAP was the Greater New York Fund/United Way in 1974. Currently one of the largest is the Management Assistance Project of the Twin Cities, in St. Paul, MN. It started in 1980 as a part of United Way but spun off in 1981, maintaining a United Way affiliation.

The Minneapolis/St. Paul MAP is sponsored by 27 area companies, including 3M, General Mills, and U.S. West. The employees and retirees of the sponsor companies can become MAP consultants or board members to non-profit organizations. The corporate volunteers help out in areas such as accounting, budgeting, board of directors services, communications, computer and telecommunications, facilities management, insurance services, legal services, marketing, mentor services, organizational change/strategic planning, and personnel.

In 1990 alone, more than 600 non-profit organizations benefited from this MAP. Among aging organizations receiving assistance are the Minnesota Senior Federation, Meals at Home, the Metropolitan Senior Federation, the Minnesota Senior Center, the National Retiree Volunteer Center, North Suburban Senior Council, and Senior Community Services.

Non-profits are charged a fee for the assistance provided through MAP. This fee averages $200 and supports the MAP office and employees. Project time frames range from a few hours to more than 100 hours; a typical project takes between 10 and 20 hours.

Although consultants are volunteers and provide their services free of charge, a rough estimate by a MAP volunteer manager indicates that about 20% of all time spent with non-profit organizations is done through corporate release time. Thus, MAP has the leverage to have employers contribute to non-profits by allowing their employees to do volunteer work on company time and with company pay. In 1990, 87% of the non-profits that were served indicated that their organization was more effective because of a MAP volunteer's efforts. At the same time, 91% of the volunteers indicated that their experiences were very personally rewarding.[5]

"In a partnership, you have to be able to rely on the professionalism of the person on the other end. It's a real time-saver if they do their job well."

Nancy Beric
Public Relations Assistant
J. Walter Thompson, Chicago

Retiree Programs

A popular organizational approach to providing volunteer services draws on retirees. Although the majority of Americans who volunteer are also in the workforce, some corporations have been successful in establishing a retiree corps—often having instilled the habit of volunteerism during their employees' pre-retirement years. One very visible group of community-service volunteers that includes both active workers and retirees is the Telephone Pioneers of America, longer service and retired employees from the telecommunications industry. For years the Pioneers have been active partners with aging service providers in many communities.

A service agency could develop a partnership based upon the model provided by the Group Health Cooperative in Seattle. This large HMO uses retirees to enhance the services it provides its members in a variety of ways, ranging from a pool of ready helpers on call—known as "I'll Try Anything Once"—to a highly trained group of peer counselors who provide support to older members reluctant to use traditional mental health services.

As mentioned in the introduction, companies have become increasingly interested in encouraging retirees to participate in volunteer activities. Seen as ambassadors to the community, retirees can help companies fulfill their commitment to social responsibility while promoting a "new role" outside the workplace for retirees.

Combining Different Types of Business Support

Atlanta offers an example of a successful composite of several of these volunteerism approaches. There the Area Agency on Aging, the Atlanta Regional Commission, has established an Aging Services Corporate Volunteer Program to match employees and retirees with agencies in the region that need volunteers to help provide services to older adults. This effort to enhance and expand meals-on-wheels, friendly visiting, transportation, home repair, and other individual and group services was initiated with funds secured through a grant from private industry.

This model, in which the aging network actually helps to develop the employer's own volunteer program, is a model you may want to pursue. You can help the private sector partner organize employees and/or retirees and can provide training to employees who take responsibility for coordinating volunteer activities. You can also assist businesses that offer pre-retirement planning programs by describing volunteer opportunities available upon retirement.

Chapter 3

Special Considerations and Essential Steps in Promoting Volunteerism for the Elderly

Whatever strategy you choose to promote volunteer partnerships with business, you should know that some companies and their employees may not view "aging" as a priority issue. Several of the private sector representatives interviewed in the course of this project noted other types of volunteer projects their companies had undertaken. Many of these efforts involved children and youth. Working with youngsters tends to be perceived as fun and rewarding; "selling" a youth-oriented project to volunteers, who are usually raising children of their own, or to the company, which sees youth projects as an investment in the future of the community, is usually not difficult.

In addition, volunteer programs that involve face-to-face contact with seniors may not be of interest to many potential volunteers. Asking a full-time employee to make a commitment to make regular visits to a nursing home, or to the home of a stranger who may be frightened, hostile or confused may be a hard sell. Potential volunteers may be more comfortable with making a one-time commitment to a senior or in working on projects that may not involve direct services to an older adult.

Recruiting volunteers for older adults who have critical long-term care needs is a challenge. It can mean asking people to confront something many of them fear greatly: their own aging. Direct encounters with the elderly most in need of assistance bring volunteers face-to-face with the harshest realities of advanced age—the loss of independence, attractiveness, friends, health, income, and comfort. In some cases it can bring painful memories of a beloved grandparent or mirror the volunteer's own caregiving crises with an aging parent. As you know, however, volunteer outreach to an older adult also can be a wonderfully rewarding experience.

Setting up a corporate volunteer program for the elderly also necessitates special coordination issues for the aging agency. You are asking for time from the company's management and employees, and, in the for-profit world, time is truly money. Since more and more companies are now allowing paid time for volunteer projects, they want to be certain that their time is not being wasted. Having the volunteers busy for the time you have them and having everything ready to start as soon as they are available is extremely important. Companies will expect immediate response and follow-up.

Training and preparation of the volunteers is critical for successful experiences. It may not be formal "training" as you usually think of it, but the volunteers need to be given all relevant information in advance and have the opportunity to ask questions about their "assignments," especially if they have some apprehension about working with older people. The volunteer coordinator may want to ascertain some of the questions ahead of time and prepare materials for the volunteers about the agency's services, working with older people, sensitivity issues, and problems or warning signs of which they should be observant.

Training and preparation of the volunteers is critical for successful experiences.

Steps to Developing Public/ Private Partnerships

The remainder of this chapter outlines eight steps to help your agency plan, initiate, conduct, and maintain successful public/private partnerships in the area of volunteerism. These steps are designed to help your agency develop a volunteerism partnership strategy rather than a specific type of partnership. Although the steps probably will be most useful to those who have not yet initiated any partnerships, even seasoned veterans should find tips and suggestions that can help improve current and future partnership efforts. Agencies are encouraged to adapt and tailor these steps to reflect past experiences with partnerships as well as current needs.

The eight steps are:

Step 1: Identify Needs and Problems
Step 2: Develop Goals
Step 3: Assess Your Organization's Readiness for Partnerships
Step 4: Select Program Options
Step 5: Plan Your Approach
Step 6: Approach Your Partners
Step 7: Implement the Partnership
Step 8: Maintain Successful Programs

These eight steps are elaborated below; specific advice is included from the private sector representatives who contributed to this guide in interviews and through participation on the special Task Force on Volunteerism assembled for this project. While the advice presented here does not apply equally to all types of volunteer partnership projects, many company volunteer coordinators repeated the same recommendations.

...needs assessment data and waiting lists may be helpful in pinpointing the areas of greatest need for individual volunteer efforts.

Step 1: Identify Needs and Problems

Your first step is to assess the needs of your clients and agency to determine where volunteer efforts will be most helpful in maintaining or expanding your agency's activities, services, and expertise. Although you may already have a good intuitive sense of where volunteers are needed, reviewing available data, talking to others in the aging network, and/or holding a brainstorming session with your staff may be helpful. For example, needs assessment data and waiting lists may be helpful in pinpointing the areas of greatest need for individual volunteer efforts.

Your colleagues in the aging network may know of situations in the community that could be addressed through individual or group volunteer efforts. A brainstorming session with agency staff will help identify internal agency needs for expertise, as well as ideas for volunteer projects to assist older adults in the community. You may also want to do a brainstorming session with your board of directors or advisory board. Be sure to include members of your corporate advisory group if you have one.

As you consider the needs of older adults in the community, ask these helpful questions:

- What types of client needs could be met by volunteers through one-time encounters?
- Which clients have ongoing needs where continuity of the volunteer is important?
- Are there clusters of clients whose needs could be met through group projects?

As you look at your internal needs, consider the following:

- Are there existing problems or projects that could benefit from short-term professional/technical expertise?
- Does the agency need help with strategic planning or longer range projects that would benefit from the assistance of a "loaned executive"?
- Are there functions or activities that your agency would like to initiate but cannot because of the lack of staff or expertise?

As you complete this step, considering and assessing your past efforts in volunteerism public/private partnerships will be important. What efforts are/were successful? Which were not? What factors seem to be associated with success or failure? What essential lessons have you learned from past efforts that can be applied to your current plans?

Step 2: Develop Goals

Using the data gathered during Step One, you are ready to select the needs/problems your partnerships will address and to determine the specific goals for the partnerships. Like the goals of your other activities, partnership goals should be specific, measurable, and achievable. You may, for example, start by trying to match volunteers willing to visit isolated seniors with the first fifty clients on your waiting list for Senior Companion services.

While each partnership should benefit older adults, your agency, and your business partner, the selection of some goals will necessarily place greater emphasis on one of these three beneficiaries. For example, a volunteerism partnership designed to fill a missing service gap in the community may primarily benefit older adults. In contrast, your staff may be the primary beneficiaries of a partnership whose goal is to provide technical/management expertise to your organization. While no particular emphasis is right or wrong, you may want to balance beneficiaries over the course of several partnerships.

Possible Goals of a Volunteer Partnership

Some goals that other aging network organizations have identified include:

- To expand existing services such as meals-on-wheels without increasing staff.
- To fill gaps in the existing social service network.
- To provide technical and management assistance to agency staff.
- To add a corporate perspective on agency advisory boards.
- To build links and networking opportunities with the private sector.
- To buy-in the personal commitment of corporate representatives to the agency.
- To increase business and private sector awareness of aging issues.
- To expand the base and expertise of community volunteers.
- To provide meaningful roles for retirees.
- To educate employed volunteers on the needs and concerns of retirees and other older adults.
- To expand the base of community coalitions to include non-traditional partners.
- To expand the base of advocacy allies in the community.

...companies are more willing to work with agencies that have a high profile and that are known to have high quality programs and services.

Step 3: Assess Your Organization's Readiness for Partnerships

With one or more partnership goals in mind, you are ready to assess your internal strengths and weaknesses. The purpose of this step is to ensure that your organization is prepared to carry out the partnership(s). Specifically, you will need to consider the resources you have available to devote to the development and implementation of the proposed partnership(s). Resources you might assess include:

- staff time
- staff expertise
- staff commitment
- materials and supplies
- printing capabilities or budget
- office space
- communications capabilities (telephone and computer hardware/software and staff ability to handle calls professionally)

If your own internal resources are insufficient to mount the proposed partnership, you may want to develop a plan for acquiring those resources or put your plans on hold. Remember, too, that companies are more willing to work with agencies that have a high profile and that are known to have high quality programs and services. If your agency is relatively new, you may need to concentrate first on the quality of your services and then on community awareness of your mission. Look at your strengths and what you have to offer.

Step 4: Select Program Options

Now is the time to choose the partnership option or range of options that will address the problem(s) and goal(s) you've identified in the previous steps. For example, if your goal is to expand the number of home-delivered meals, your options might include variations in the types of volunteer assignments that would help you meet your goal (i.e., preparing meals versus delivering them), as well as variations in who your volunteers are (i.e., employees, family members of employees, or retirees and their spouses). Another idea might be to provide a potential business partner with a list of one-day volunteer opportunities that your agency could help facilitate. This might include a special holiday program at a senior center or nursing home, or a weekend paint-a-thon for low-income elders in the community. These kinds of choices allow your potential business partners to select the option that has the greatest appeal to potential volunteers and that meets the company's own social responsibility goals.

In selecting program options to present to prospective partners, you also might want to consider the following factors:

- **Return to Volunteers**—consider projects that afford volunteers the opportunity to see immediate results of their work.
- **Scale**—you may want to do small pilot projects before attempting to cover all your potential volunteer needs. Short-term group projects are good candidates for success and create an environment where employees will be more willing to volunteer again and take on independent projects.
- **Training and Supervision Requirements**—group projects tend to require less training and supervision than most one-on-one situations, so they may be more feasible for small agencies that cannot devote the staff time to volunteer training and follow-up.
- **Age of Volunteers**—younger people may be reluctant to work with the elderly due to misconceptions or fears about working around persons who are frail or perceived as "crabby." Consider in advance how you will accommodate younger volunteers, perhaps placing them in an initial experience that is short-term and guided. You may want to arrange for training or information prior to the assignment to ensure that their volunteer experience is positive and mutually beneficial to them and the older person.

Step 5: Plan Your Approach

This step requires you to translate your program option(s) into an actual plan, to identify potential partners, and to develop written materials that you will use in approaching potential partners. Begin by dissecting your option from a business perspective. Identify the benefits that your option or program offers to business. These might include:

- well supervised volunteer opportunities
- enhanced employee morale
- opportunities to satisfy corporate responsibility goals
- publicity and visibility in the community
- education about aging and aging services.

Keep these benefits in mind as you develop your plan and create written marketing materials. This information also will be helpful as you develop your "sales pitch" for one-on-one meetings with prospective partners.

Create Your Plan

Your plan will specify how the option or program will actually work and what is required, from both your organization and your partner, to make it successful. The length and detail of your plan will depend on the nature of the partnership you are proposing. A one-time-only group project, or request for technical expertise, will be shorter and less detailed than a proposal for an ongoing clearinghouse arrangement. The suggested elements of your plan are summarized in the box on the next page.

Identify the benefits that your option or program offers to business....Keep these benefits in mind as you develop your plan and create written marketing materials.

Elements of a Partnership Plan

- **Partnership Goals and Objectives:**

  Specify the goals and objectives of your partnership or project. Provide a brief description of the activity/effort.

- **Organizational Resources:**

  Describe financial and in-kind resources from your organization and staff to be deployed on the project.

- **Outside Support and Resources:**

  List contributions (cash and in-kind) to be made by business partners, grants for which you will apply, and elements of your project that are already in place. (For example, you may already have a well-tested curriculum to train volunteers for one-on-one assistance, or you may have already identified the beneficiaries of a group project such as a senior center renovation.)

- **Operations and Timeline:**

  Outline how the project will be accomplished and the time frame, including tasks to be performed by staff of your agency and those of your business partner. Since proper management of the volunteer program is a crucial concern of the company, demonstrating that the project is well-organized and well-run is important.

- **Evaluation:**

  Determine how you will know if your partnership is a success and meets its goals. Be sure to consider the perspectives of your organization, your business partner, and older persons who receive volunteer services.

- **Long-term Plan:**

  Determine how you will sustain the project if it is intended to be ongoing. Identify ways in which the initial partnership might be expanded, either to include other projects with the same partner, or by using additional partners to sustain the initial effort.[6]

Identify Potential Business Partners

Depending on your location, you may have many potential partners for your proposed project. To help sort through the possibilities, consider:

- Companies with whom you have already developed a relationship through your current volunteer programs/projects, advisory committees, or other projects with your organization.
- Companies with the expertise required for management/technical expertise projects.
- Companies that have a local reputation for their interest in volunteerism and/or aging.
- Companies that have become nationally known for their commitment to volunteerism and/or aging and have a local office.
- Companies having a reputation for being socially responsible and supportive of community initiatives and organizations.
- Companies that market products and services to older consumers.

As you begin to narrow the list of companies you will actually approach, become familiar with each company by reading annual reports and newsletters. Who runs the company? What are their interests? Research the company's operations and prior record of civic/volunteer interests, and be sure you have a basic understanding of what they do. Review the annual reports to see how corporate social responsibility activities, including employee volunteer efforts, are presented to shareholders. Look for connections between your needs and their interests. Is there anything about the company's work that could benefit from involvement with an aging agency or older persons, e.g, use of senior focus groups, pre-retirement planning, caregivers' seminars?

Learn the language of business and the business climate of your area. Read the business pages and publications regularly, taking note of developments which may affect the operation of your present and potential corporate partners. Be sensitive to changes which may affect the company's ability to respond to your volunteer requests.

Look at the type of work done by your prospective partner(s). Are certain times of the year "busy" due to production schedules or seasonal factors? What about staff vacations, holiday activities, and other volunteer efforts that may conflict with your request? Be aware of these in your planning and accommodate them.

Be aware of the company's policy (if it has one) regarding the use of volunteers. Be sure that you are submitting your proposal to the proper person.

If you are approaching a regional office, find out if any volunteer initiatives are taking place at headquarters. If the head office has supported a project, it may be easier to obtain local support.

Remember that many businesses prefer to initiate community projects through community/business groups such as the Rotary Club or the local Chamber of Commerce. These groups should also be on your "contact list."

As you identify and research specific companies, you may also want to keep in mind the company's reputation in the community and in relation to older persons or aging generally. Some aging agencies involved in public/private partnerships have developed ethical guidelines to help them choose business partners.

Learn the language of business and the business climate of your area.

Proposal Checklist

Have someone who is not involved with your agency review your plan. The review should generate "yes" answers to the following key questions:

No	Yes	
☐	☑	Proposed project clearly described?
☐	☑	All timeframes clear?
☐	☑	Benefits and publicity spelled out?
☐	☑	Responsibilities of each side clearly defined?
☐	☑	Contact persons identified?
☐	☑	Plans for training spelled out?
☐	☑	Volunteer recognition addressed?
☐	☑	Choice of options listed?
☐	☑	Mission and needs of your agency described fully but concisely?
☐	☑	Information provided about prior success and services?
☐	☑	Special services your agency could provide noted?

Prepare Written Materials

You will need to provide prospective business partners with written materials that describe the partnership opportunity, the benefits your partner can expect from participating, and the specific contribution(s) you expect your partner to make. In preparing your materials, remember to be succinct and to avoid social service jargon. Describe and "sell" the benefits not the features of your partnership!

The length and complexity of your written materials will vary depending on the nature of the proposed partnership. Obviously, a one-time-only group project will require less detail than an ongoing volunteer clearinghouse partnership. Be prepared to provide information about your agency, such as an audited financial report and a mission statement, if asked.

Of course, you will want your marketing materials to look professional, but they do not have to be expensive or slick. A cover letter and a one- or two-page description will be sufficient in most cases. Have a member of your corporate advisory board review your materials as they are developed to help insure that your message is conveyed in a way that will be well received by potential business partners.

Remember, once the approach has been made and a business partner secured, you must be ready to follow through quickly. You will want to develop "job descriptions" and training materials in advance to speed up the implementation process.

Once the approach has been made and a business partner secured, you must be ready to follow through quickly.

Step 6: Approach Your Partners

As a result of completing Step 5, you should have identified several potential partners for each of the options you plan to pursue. The next step is to secure an appointment to present your partnership idea.

You may want to begin by approaching companies with whom your organization already has an established relationship. These "hot calls" are easiest to make because you have already identified the appropriate contact.

If no previous relationship exists with a prospective partner, ask a business person who has a contact inside the company to make the first contact for you. Your go-between should know enough about your organization and its successes to be credible; follow-up this "warm call" to set a time to present your partnership opportunity in person.

"Cold calls" are generally preceded by a letter which indicates that you will be calling to arrange an appointment. Although "cold calls" are more difficult to make, they have worked for some aging agencies and should be not be dismissed out of hand.

In identifying whom to call, check first to see if the company has a volunteer coordinator or liaison. If not, and the company is a larger firm, try working through community affairs/external affairs, public relations, human resources/personnel, or work/family departments. There is nothing wrong with calling the office of the chief executive officer or president to ask where your inquiry should be directed. Also, don't overlook the potential of smaller businesses.

Although our focus here is on marketing a specific partnership opportunity to one or more potential business partners, you may also want to develop a broader marketing strategy to get your agency and its programs, services, and volunteer opportunities better known among members of the business community. If so, consider the following:

- press releases and other regular media contact
- public service announcements
- advertising on public transit and billboards
- advertising in community newspapers
- requesting an interview or submitting an article for the business pages, business papers and company newsletters
- attending corporate/civic luncheons and benefits
- hosting a breakfast or other meeting for businesses
- joining Chambers of Commerce
- attending open meetings of business and professional associations to network
- distributing flyers about volunteer opportunities with your agency
- encouraging your partners to publicize their involvement in your volunteer program

In making your request, whether in person or by phone, consider the following guidelines:

- Highlight the benefits, both short- and long-term, to the company.
- Highlight the benefits to older persons, the community, and your organization.
- Be specific and direct about what you are requesting. Be sure there is understanding between the company and your agency about each other's goals and intentions.
- Avoid social service jargon. Companies want credibility and accountability. Commitment to quality and image must be demonstrated, since the primary benefit the company receives as a result of these efforts is often publicity.
- Describe past successes and identify other business partners. Some non-profits have a reputation as inefficient; be prepared to disprove that stereotype.

Selling Points

for Marketing Your Volunteer Partnership

- Emphasize the human factor. Have some stories to tell about your clients and your work. If available, have information ready about previous successes.
- Use photos or videotapes of volunteers in action for promotional purposes—it's good for recruitment, and also makes publicity easy.
- Suggest incentives for volunteering; a paid day for volunteering is popular among some companies. Others reward employees through recognition ceremonies, commemorative T-shirts and other memorabilia.
- Point out that many employees are interested in volunteering but don't know how to begin. Demonstrate how your agency can work closely with the company volunteer coordinator to develop a placement plan.
- Offer the volunteering experience as an opportunity for personal growth for the employees who participate, or to foster team spirit with group activities; they can be used to stimulate "healthy competition" among company units and divisions.
- Demonstrate that your agency can accommodate the preferences both of volunteers who want to start their experiences in a group activity, as well as those who want to work on their own.

- Listen carefully to the company representative to identify the company's mission and priorities, as well as the community issues and events that are important to the firm. If the company does not wish to participate in this partnership, explore areas that would be more amenable to collaboration.
- If possible, present several partnership options for consideration. For example, you might present a one-time-only group project idea, opportunities for one-on-one involvement, as well as a request for special expertise.
- Be flexible and willing to accommodate the needs of your partner as long as the goals and objectives of the partnership are not jeopardized.
- Provide enough time for the company to consider your request; your contact may need to consult other individuals in the organization.
- Name a specific date that you will contact the potential partner and follow through. Consider taking a short commitment form that could be signed that day or returned via mail or fax.
- Send a thank-you letter.
- Follow-up on any requests for additional information promptly.
- Because professional attitude and appearance are extremely important in working with the private sector, re-assess your style and make necessary changes.

Listen carefully to the company representative to identify the company's mission and priorities, as well as the community issues and events that are important to the firm.

Step 7: Implement the Project

After you have secured the commitment of your business partner, the time has come to implement the partnership using the plan created in Step 5. As you proceed with implementation, perhaps the most important thing you can do is maintain good communication with the company volunteer coordinator or key liaison.

Be sure you can do what you proposed to do; don't make any promises you can't keep. If modifications in your original plan are necessary, be sure to check and clear them with your company liaison.

Remember, once you have a partnership, the company's reputation is linked with yours. Ask if the partnership is meeting the company's goals and needs; be prepared to modify your project if needed.

Collect feedback on the project before repeating or expanding. If you are dissatisfied with the company's handling of the project, it's all right to look for another partner, but be sure to give the proper thanks and recognition to the company and its volunteers before you move on.

Step 8: Maintain Successful Programs

Successful projects can be repeated or expanded easily, and you can use successes with one company to sell the concept to other partners as part of your marketing and promotion efforts.

Recognition of both volunteers and companies is critical. A primary motive for corporate community activities is public relations, and this must never be forgotten. Make the project as visible as possible, with the company's permission. If you have organized your work and documented your efforts, it should be fairly easy to repeat the program and market it and new ideas to other companies.

Consider the following points for maintaining volunteer commitment.

Volunteers

A high level of motivation and strong personal rewards are important for success.

Communications sent directly to employees' homes are a good recruitment vehicle and are often passed along to others. Use newsletters (your own or the company's) or a special mailing with the endorsement of the company's management, preferably the CEO or president.

Peer influence is useful; find and use volunteers who are enthusiastic and can be part of the promotion and recruitment process. Recognition and commendations for volunteers are essential and should be given by both parties, the company and the aging agency. This is often the only compensation volunteers receive, and it is critical to bringing them back. Formal recognition events work well.

Profiles in company newsletters are good for recognition. You should also profile participating companies and special volunteers in your own newsletters.

The importance of personal expressions of thanks cannot be overstated. Notes or letters from the CEO are especially appreciated.

Put active volunteers on mailing lists and keep them informed of upcoming events and emerging community needs to hold their interest.

When employees have indicated an interest in volunteering, respond and place them as quickly as possible before you lose them.

Encourage employees to think about volunteering after retirement by incorporating information about opportunities into pre-retirement planning presentations. Your agency can be a company resource for pre-retirement planning information.

Tips

for Ensuring a Successful Volunteer Partnership

- Prepare a "job description" of all tasks volunteers can expect to perform while on assignment.
- Provide background information about the client or assignment, noting anything that could be important or significant.
- Provide information on how volunteers can contact your agency in case any problems arise.
- Provide complete information regarding time and place, including directions, and any other materials needed.
- Identify any out-of-pocket costs to the volunteers connected with their assignment. Determine with the volunteer liaison how these will be addressed, and be certain that volunteers are aware of any responsibility on their part.
- Provide all information to volunteers well in advance of their assignment date so that they have the opportunity to ask questions. (See Appendix C for sample volunteer forms.)
- Hold any required training at the employer's site if possible.
- Have everything ready for the volunteers as soon as they arrive at the site.
- Leadership of the project is critical. Ask the volunteer liaison to identify and seek out the "natural leaders" to work with the team projects. Try to get top people from different sections for competitive or cooperative projects.
- Remember that time frames are critical in the private sector. A rapid response to any and all inquiries and requests is expected at all times. Return all phone calls promptly.
- Follow up with the volunteers as soon as possible after the experience to get their feedback and evaluation of the situation. A survey or questionnaire may be useful.
- Be sure clients also are prepared for the volunteer experience. Screen them if necessary, and notify them in advance, at least in writing, about what will be happening and when. Tell them who is volunteering so they know what to expect. Provide them with a contact is case a problem arises. This is most pertinent to isolated or homebound seniors.
- If it is a group activity at a site like a senior center or nursing home, give the particulars to a contact who is responsible for supervision of that site.
- Volunteers may need physical examinations under certain circumstances. Be sure to discuss this with the company liaison to ensure that no problems or conflicts arise from the requirement which would make volunteering difficult.

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Partners

Once in touch, stay in touch. Keep the company informed on a continuing basis about opportunities and events coming in the future—e.g., a company may want ideas for a holiday project so it can plan ahead.

Look for ways of expanding the volunteer initiative by suggesting competitive or collaborative projects between your partner company and some of their competitors or affiliated companies.

Help the volunteer coordinator wherever you can to make volunteering easy, and make volunteerism a routine part of the employees' lives and the corporate culture. Where you can, establish calendars and cycles of ongoing volunteer activities.

Get to know the people in the company with whom you will be dealing. Develop a direct relationship with them. Work together as a team so that both organizations will be satisfied.

Look for media agents who are interested in doing features about aging, senior citizens, partnerships, or your partner company. Keep in touch with them, and alert them to upcoming events that might be covered by radio, television or newspapers.

Remember to notify your company volunteer liaison when you have requested media coverage of their volunteers' activities.

When you decide to market a successful project to new partners and you want to describe your experiences or use photos, videos, etc. from your present or past partner, be sure to tell them and obtain their permission to use this material, if applicable.

Any program you start can expand. Watch how the company responds and follows through. If the experience is positive, work on expansion.

Marks of Success

What are some of the common characteristics of successful volunteer projects?

- Benefits for all partners in the partnership.
- Top corporate support. Clear endorsement from top management and commitment of time, funding, staff and/or resources.
- Professionalism and quality of the community agency.
- Appropriate treatment, placement and recognition of volunteers.
- Complete, accurate descriptions of the volunteer role.
- Adequate volunteer recognition and support services.
- Creative use of volunteers' special skills to enhance personal growth in the volunteer experience.
- Use of pilots to pre-test large scale projects.
- Promoting ownership of the project through the "adopt-a-senior, -home, or -family" approach.
- Linkage through a central referral agency, such as a community or corporate volunteer center.
- Orientation and training of volunteers, frequently using written guides or procedures.
- Flexibility and preparation by the community agency in offering a range of well-planned volunteer options.

The future

If your agency needs donations of products or funds in certain areas, be sure to let the company know the specifics. They may not be able to respond immediately, but may be more inclined to give to an agency with whom they have a working relationship when such things do become available. They may put you on a waiting list for products or give you special consideration for a financial request if you have had a successful volunteer program together.

Keep an eye to the future. Let the company know if you are looking for a board member with special qualifications. Your volunteer project partners may be excellent resources as board members who will have valuable business contacts for your agency and fundraising efforts in the long run. Non-profits often need the expertise and clout of advocates in the business sector.

Always be on the lookout for ideas for new or improved volunteer projects. Consult newsletters from volunteer centers; review philanthropic materials, such as publications from the Foundation Center, which feature articles about fundraising efforts and joint public/private projects.

Work with your company liaison to determine new interests of their employees and management for volunteer projects. If possible, survey them and ask a committee of interested employees and managers to select new projects. If your agency has multiple needs, ask them to pick what they want to work on. Their continuous input promotes ownership of the projects.

Summary

The aging network must make every effort to understand the community interests of potential partners. Research them, their history of community support and their civic interests. Look for projects which will match business, agency, and clients' needs.

When you approach your partners, highlight the ways in which information about the volunteer effort will be publicized and disseminated. Ask what the agency can do for them in terms of recruiting or preparing retirees to serve as volunteers for appropriate projects. Be prepared with a list of what services the agency or aging network can offer them (e.g., eldercare and caregiving information, pre-retirement planning, training).

Don't hesitate to make the appeal for assistance from employees very personal. The rewards of volunteering tend to be intangible; it may help to frame requests for assistance in terms of, "If this were your mother or father in need and you couldn't be there, what would you want for them?"

The importance of making the contributions of the corporate partner visible cannot be underestimated. This is especially true in volunteerism. It is also important to highlight the personal benefits to the individual employee volunteers and elderly service recipients via some form of publicity (news articles or features, videos, coverage in employee and retiree newsletters). People want and need to know that their contribution of time truly makes a difference.

Peer influence is useful; find and use volunteers who are enthusiastic and can be part of the promotion and recruitment process.

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Chapter 4

Partnership Profiles

Chapter Two introduced the range of volunteerism partnerships possible and identified several specific programs. This chapter provides additional information about these and other volunteerism partnerships between businesses and aging agencies

According to attorney and [Aetna] spokeswoman Sandra Williams, "Every lawyer who has joined the program has stayed with it; there is a great deal of satisfaction in working with these clients and a high level of appreciation."

Aetna Life and Casualty

Based in Hartford, Connecticut, Aetna sponsors two programs providing free legal services to older persons who meet certain age and income restrictions. Aetna uses corporate attorneys, paralegals, and support staff to assist in cases involving public benefits and entitlements, wills, probate, power of attorney and conservatorship, landlord-tenant disputes, consumer credit, divorce, victim assistance, bankruptcy, age discrimination, and living wills.

This program was one of the first to use corporate lawyers in individual *pro bono* cases, initiated in response to publicity about the legal needs of the elderly. Referrals may come from other legal service providers, and referrals may be made if clients do not meet the guidelines, if there is a conflict of interest, or if the case is inappropriate.

Program representatives make presentations at senior centers and may provide services out in the community. The program was well thought out before it began in 1980. It started small and has grown with no major problems. Aetna is continually involved in recruitment, lawyer education, and community outreach to serve isolated seniors.

According to attorney and spokeswoman Sandra Williams, "Every lawyer who has joined the program has stayed with it; there is a great deal of satisfaction in working with these clients and a high level of appreciation."

American Express Corporation

As part of its larger work/family initiatives, American Express Travel Related Services Co., Inc. (TRS) started a paid sabbatical program in 1991. The program was initiated in response to a survey of the division's 30,000 employees that focused on workplace policies and programs.

In the first year, 14 employees served organizations such as the Red Cross, a homeless shelter in New Orleans, and a children's home in Florida. Two persons worked for aging organizations: one in New Jersey, at the Morris County Nursing Home, the other at Senior Citizens Services of Cupertino, California. Activities at both sites included assisting with doctor's appointments, organizing and coordinating activities such as birthday fairs and special dinners, arts and crafts, and bringing people to polling places.

Employees with a satisfactory record over the past three years and TRS service of at least 10 years are eligible for the program. They can serve the community for a period of one to six months; with a TRS service of 20 years or more, the community assignment can even last up to a full year. The employee is guaranteed the same or a similar job upon return to the company. The program is publicized in several newsletters throughout the company.

Employees apply by filling out a form, with additional information provided by the community organization or educational institution to be served. Applications are reviewed by a Sabbatical Board comprising employees at various levels throughout TRS.

The sabbatical program has an annual budget of $500,000. Because of this cap, not all requests can be fulfilled. In 1990, the number of applications that had to be rejected was double those that could be accepted. Even though the recession is negatively influencing many organizations, AMEX TRS has set a precedent and example for other companies: Even in tough times, beginning a program that provides benefits to both employees and the community may still be considered worthwhile.

Arkansas ABLE

Arkansas ABLE (Ability Based on Long Experience) in Little Rock, Arkansas, is an organization devoted to the promotion of older worker employment. The organization is headed by a 15-member Board of Directors, of which typically about one-third has had a corporate background. Currently, eight of the Board members are from the private sector. The corporate members come from a variety of businesses: manufacturing, financial institutions, insurance companies, and public utilities. Six of the members represent employers with more than 1,000 employees, the two others are owners of small businesses.

Besides policy making, the corporate Board members are involved in other tasks at Arkansas ABLE, principally in the area of human resource administration. Examples include the development of staff evaluation policies, salary ranges, agency application forms, and the conduct of staff workshops on such topics as team building and staff communication. In addition, the Board's attorney also offers legal advice.

According to the executive director, the organization is able to use the day-to-day skills of the corporate members. At the same time, the organization is assured of appropriate and legal policies. In addition, Board members add to the organization's credibility, donate finances, and promote contacts in the business community. Members, of course, must balance work responsibilities with their Board duties, and reaching members or getting them to attend meetings can be difficult at times. This is particularly true during periods of economic downturn.

Even though the recession is negatively influencing many organizations, AMEX TRS has set a precedent and example for other companies.

The [Blue Cross/Blue Shield] director/ treasurer notes that "involvement and volunteerism are extremely useful to this kind of organization, and one needs to reach out and serve when called upon."

The director of human resource development at Blue Cross/Blue Shield is currently ABLE's treasurer. He spends about 6 hours a month for ABLE signing checks, serving on the public relations committee, and participating in general meetings. He also has conducted some team building sessions with agency staff, all on company time.

Blue Cross/Blue Shield allows and encourages its employees to serve on boards in order to show their concern for the community itself. The experience is valuable for employees, allowing them to be part of a worthwhile and professional organization, to network, and to gain information about aging and the needs of older adults. The director/treasurer notes that "involvement and volunteerism are extremely useful to this kind of organization, and one needs to reach out and serve when called upon."

Atlanta Regional Commission

In Atlanta, services to elders are enhanced and expanded through a multi-partner arrangement as well as through the use of almost all of these organizational approaches.

The partners include: the multi-county Area Agency on Aging, the Atlanta Regional Commission; twenty community-based agencies, including the county-based aging programs in all nine counties served; the Volunteer Center of the United Way of Metropolitan Atlanta Inc., the central volunteer placement agency; and IBM.

IBM has played a key role through providing initial funding, through the active roles played by its External Programs Department and its Employee Benefits Department, through the voluntary services of its employees and retirees, and through the identification of elders in need of services via referrals from its employee Elder Care Services.

The roles and inter-relationships of the partners are best seen in the path of the IBM volunteer as he or she proceeds:

- The IBM employee expresses an interest in volunteering and contacts the External Programs Department.
- The employee completes a volunteer interest form.
- The External Programs Department faxes the form to the Volunteer Resource Center of the United Way.
- If an interest in serving elders is indicated, the form is sent to the Atlanta Regional Commission's Corporate Volunteer Program.
- A call is made from that program to the volunteer to confirm interest and collect further information.
- Finally, the volunteer is linked to the volunteer coordinator of the local program most convenient and appropriate for the volunteer.

The employee or retiree volunteer chooses not only a convenient site but an appropriate activity as well. The opportunities include variations of almost all types of programs described earlier: meals-on-wheels delivery, in-home individual assistance, a range of group projects, and loaned personnel for agency assistance.

Although the partnership originally included only IBM as a corporate partner, expansion to other businesses and corporations is planned.

The Chicago Fund on Aging and Disability

The Chicago Fund on Aging and Disability was started in 1987 by the Chicago Department on Aging as a private, non-profit corporation with an independent board of directors. Most of its administrative expenses are supported by the CDOA, and personal contributions and proceeds from special events go directly for services. Its mission is to supplement limited public funds for services for the elderly and persons with disabilities. The priority has been on volunteer-provided home-delivered meals for the holidays, when the regular meals program does not provide service for the approximately 3,000 homebound persons presently in the program.

The Chicago Fund has been exceptionally successful at leveraging private support and interest to expand limited public services. Due to the efforts of board members and their friends and associates, most of whom are in the food and beverage industries, the Fund's resources and profile have grown tremendously since its inception. All of these supporters are volunteers.

The connection to *Light Up Chicago One-to-One*, the Chicago Department on Aging's volunteer program, is made at the holidays, when Alexandra Lyons and the Fund's executive director, Roberta Michaletz, collaborate to recruit and place volunteer visitors to all of the homebound persons who will receive a holiday meal through the Chicago Fund and who have also requested a visitor on that day. Mayor Richard Daley makes annual appeals to all city employees for holiday meal donations and/or visits for the homebound elderly and persons with disabilities.

In late 1990 almost 600 holiday visits were made by city and private employees. Some of the visitors even bring small gifts, and this encounter, although planned as a one-day event only, is often the beginning of an ongoing relationship.

Federal Express

Founded in 1973, Federal Express, an overnight delivery company, has a long history of commitment to volunteerism with strong support of top management. Its community service values are reflected in its "People-Service-Profit" philosophy: "When the company puts its people first, they will provide outstanding service, which in turn will lead to profits." This statement neatly captures the spirit of "enlightened self-interest."

Federal Express uses a service team approach, which started as a pilot program with help from the Memphis Corporate Volunteer Center. The service teams were launched with a video, which enlisted top managers to encourage participation. Senior management was later recruited to adopt a team or teams of employees, which are devoted to areas such as arts, children/youth, health, handicapped, and senior citizens (known as the "Expressly Gray" team).

Each team is given a budget and one hour of work release time per month to plan activities; the volunteer work itself takes place on personal time. Team leaders usually change annually, with orientation in June and organizing and assignments in July.

Guidelines for team activities are outlined in a *Corporate Neighbor Team Manual* and *Officer's Handbook*. The local Volunteer Center provides a "wish book" which describes services and needs of community agencies and weekly requests. Agencies requesting volunteers must be very specific and organized in their requests for assistance and follow-up.

[Federal Express] community service values are reflected in its "People-Service-Profit" philosophy: "When the company puts its people first, they will provide outstanding service, which in turn will lead to profits."

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Most [Hyatt FORCE] participants had never volunteered before and almost all felt the experience to be very positive.

Most of the projects chosen are one-time events, such as a *Christmas in July* for a senior center, dances, parties, picnics, and a nature hike for elders with Alzheimer's disease and their caregivers. The majority of the referrals come through the Volunteer Center. Critical elements in this system include advance notice to allow for scheduling and publicity, one-time events, and strong team leadership.

Helene Curtis

The strong commitment of this Chicago-based cosmetic company to community issues can be seen in the interests of its president and CEO and in the efforts of its manager of administrative services.

Helene Curtis began its formal volunteer outreach with a successful pilot of a holiday Adopt-a-Family project. Out of three candidates, Catholic Charities was chosen to be the sponsoring community agency on the basis of the agency's record in the community and non-exclusionary policy toward clients. After a small pilot in 1989, the project was introduced to the entire company in 1990, with word spread through the divisions to encourage employees to make personalized gifts and contributions to needy families and seniors. The community sponsor acted as the link between the contributions and the clients to maintain confidentiality and privacy for the needy. It received a good deal of publicity and resulted in good personal experiences for both the givers and receivers.

The company has added different activities, many of which do not require a great deal of volunteer time or commitment: food drives; blood drives; bowl-a-thons; voter registration; use of the beauty salon and board room to kick off the local American Cancer Society *Look Good, Feel Better* campaign for recovering cancer patients; a pilot for a *Day of Beauty* for residents of a shelter for battered women; regular donations of product samples to shelters (and when an excess is available, encouraging bartering for other things needed); extensive in-kind contributions of design and printing; employee donations of used aluminum cans for a charity; linking the employees at one of their plants with an area youth center; and sponsoring a "Volunteer Fair," at which 8-10 agencies will exhibit and describe their programs in an effort to enlist volunteers.

Hyatt Regency Hotel

In January, 1990, Hyatt Hotels' corporate headquarters launched its company-wide volunteer program, *Hyatt FORCE* (Family Of Responsible, Caring Employees). In a message from the president, all manager level employees at all 105 Hyatt Hotels were directed to volunteer in the community for one day with pay. The Chicago Hyatt Regency piloted the program from April to October with 230 managers participating out of a workforce of 1,700. The program was coordinated by one person in the human resources department.

Although the service sector partner could have been any agency, including an aging agency, this hotel chose an agency serving abused children. Assignments were often specialized and made use of the volunteers' skills, using a task force approach: some worked with the children directly; wardrobe staff assisted with the clothing donations; engineering staff helped with the physical plant, and so forth.

Most participants had never volunteered before and almost all felt the experience to be very positive. Several staff have since given extra hours of their own time to the agency, which is significant given that their workplace operates on a 24-hour basis and many employees often work extra hours.

In addition to the clear mandate from corporate headquarters, the management of the Chicago Hyatt Regency has demonstrated a strong commitment to volunteerism. Annually, they create an actual carnival in their ballroom for employees and families, and open it up the day before to 3,500 underprivileged children in cooperation with the Variety Club. They serve a Thanksgiving dinner to 3,500 senior citizens, staffed by junior high school students from a public housing project who have been trained and "hired" by the hotel through an Adopt-a-School program. The employee volunteers are asked for suggestions for projects, and after collecting them, the hotel narrows the field down to 3-5 partners to work with throughout the year.

Orientation and training is provided to all volunteers at either the volunteer site or worksite, and the coordinator sends each volunteer a thank you note.

J. Walter Thompson Advertising Agency

After J. Walter Thompson's main office in New York City had successfully offered a paid day off to employees to do community service work, the company's CEO encouraged the firm's other offices to participate as well. This project was initiated at the firm's Chicago office on December 15, 1990, with approximately 100 employees receiving a paid day off to participate in a variety of group projects, including several sponsored by the Chicago Department on Aging. In addition to an annual paid day off in December, employees are encouraged to contribute a day of their own time on a quarterly basis, typically on a Saturday, to do volunteer work.

Since the one-day event, J. Walter Thompson has established an ongoing relationship with the Department on Aging. CDOA projects have included rehabilitation of senior housing and senior centers, holiday parties and gift giving, and singing and visiting at hospitals and nursing homes. Between 20 and 50 J. Walter Thompson volunteers participate in these projects quarterly. Projects are organized by a staff person from the firms' public relations department in conjunction with the director of volunteer services at the Chicago Department on Aging.

Employees who have participated in the quarterly volunteer projects have responded very positively. Volunteering boosts employee morale, fosters a sense of team spirit, provides an opportunity to meet and get to know colleagues, and enables employees to make a meaningful contribution to their community. In addition, this type of project has enabled J. Walter Thompson to provide extensive community support with a limited financial commitment.

Volunteering boosts employee morale, fosters a sense of team spirit, provides an opportunity to meet and get to know colleagues, and enables employees to make a meaningful contribution to their community.

The [Light Up Chicago One-To-One] volunteers provide visiting, companionship, escort and transportation, simple household chores, shopping, and occasionally heavy chores, such as painting and yard clean-up.

Light Up Chicago One-to-One

Shortly after taking office in the spring of 1989, Mayor Richard M. Daley demonstrated his commitment to expanding volunteer efforts in Chicago by creating a new citywide program, *Light Up Chicago*. In the fall of that year, the Chicago Department on Aging, which is both a municipal department and an Area Agency on Aging, hired a full-time coordinator of volunteers for its own newly-created volunteer program—*Light Up Chicago One-to-One*. *One-to-One* is a program linking city government, individuals, and the private sector to provide volunteer services to Chicago's senior citizens. The *One-to-One* program recruits, screens, trains, and places interested volunteers with older persons who have needs which cannot be met through the CDOA's services or other means.

CDOA provides the program director and administrative support, and reaches out to find seniors in need. Most of the seniors requesting assistance come from the department's pool of in-home service clients, especially those who receive home-delivered meals.

Within a year, *Light Up Chicago One-to-One* had assembled a list of volunteers from among the ranks of city employees, interested individuals, and several businesses. The volunteers provide visiting, companionship, escort and transportation, simple household chores, shopping, and occasionally heavy chores, such as painting and yard clean-up.

Light Up Chicago One-to-One's director, Alexandra Lyons, has worked with organizations such as the United Way Volunteer Center and community technical assistance providers involved with volunteer programs. She has also been in touch with professional associations and business groups. A promotional flyer and linkage to the United Way Volunteer Center and the citywide *Light Up Chicago* program has aided in attracting interest from businesses. Interested parties have included a health club, banks, hotels, universities, an alumni club, and law firm. The Hyatt Hotels and J. Walter Thompson, noted earlier, are two such companies.

Paramount Cards, Inc.

Employees of Paramount Cards, Inc., a greeting card company with just 325 employees, have delivered 45,102 meals to home-bound senior citizens in Pawtucket and Central Falls, Rhode Island, since November, 1979. Paramount employees deliver a hot noontime meal five days a week to approximately 16 elderly people along what has come to be called "the Paramount route." Thirty volunteers—nearly 10 percent of the Paramount Lines workforce—make up the pool for meal delivery at Paramount. Each workday, two employees cover the route, which takes about one and one-half to two hours. Employees donate their 30-minute lunch breaks, and Paramount pays their salaries for the remainder of the time.

The personnel department provides coordination; volunteers use their own automobiles, or may use a company car; the company provides the insulated containers; the Rhode Island Meals-on-Wheels—the statewide Meals-on-Wheels program—provides the food. Paramount also hosts an annual volunteer recognition luncheon for participants.

The longevity of the Paramount program is unusual, as is its history. Founded after the wife of the former president became involved personally in delivering Meals-on-Wheels, the program has survived successive changes in personnel management and company ownership.

In addition to attracting local publicity that enhances the company's reputation and employee morale, Paramount sees the program as offering an opportunity for employees to work together in a way that involves all levels of employees while helping the community.

Park Hyatt Hotel

This small, elite Hyatt Hotel on Chicago's prestigious North Michigan Avenue initiated paid volunteer projects as part of the Hyatt FORCE mandate and has been closely involved with the Chicago Area Agency on Aging's *Light Up Chicago One-to-One* volunteer program. The hotel staff decided there should be one focus for their volunteer efforts, and they chose older adults.

The *Light Up Chicago* volunteer coordinator faxes a list of volunteer needs to the hotel, and the hotel's volunteer coordinator matches those needs with appropriate individuals, scheduling them well in advance of the event. This approach requires much staff time on the part of both parties, but results in the direct provision of individual services needed by the clients. Examples of services provided include visits with homebound elderly, household chores, escort for walks and shopping, and reading mail for a blind gentleman.

In addition to attracting local publicity that enhances the company's reputation and employee morale, Paramount sees the program as offering an opportunity for employees to work together in a way that involves all levels of employees while helping the community.

End Notes

1. This checklist of business involvement in volunteerism has been adapted from *A New Competitive Edge* by Cynthia Vissa, Kenn Allen and Shirley Keller, Arlington, VA: VOLUNTEER–The National Center, 1986.
2. VOLUNTEER, Building Partnerships with Business: A Guide for Non-Profits, VOLUNTEER–The National Center, Arlington, VA, 1979.
3. *Ibid.*
4. Lombardo, Barbara. "Understanding the Motives for Corporate Contributions." *Management Issues*, KPMG Peat Marwick, January 1991.
5. For more information on MAPs, contact United Way of America, Community Resources Division, 701 North Fairfax Street, Alexandria, VA 22314-2045.
6. Adapted from *Public/Private Partnerships in Older Worker Employment: A Guide for the Aging Network* by Denise Jessup, Washington, D.C.: Washington Business Group on Health, 1992.

Appendix A

Task Force on Volunteerism

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National Council on the Aging, Inc.

Mary Brugger Murphy
Project Coordinator

Appendix B

Resources

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U.S. Administration on Aging & Washington Business Group on Health. *Business Leadership in Aging: A Compendium of Program Initiatives.* Washington Business Group on Health. Washington, DC, 1992.

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Washington Business Group on Health. *Together on Aging: A Newsletter Devoted to Public/Private Partnerships.* Volunteerism issue, Spring 1990.

Washington Business Group on Health, National Eldercare Institute on Business and Aging. *Public/Private Partnerships: Examples from the Aging Network.* Washington Business Group on Health. Washington, DC, 1993.

Appendix C

Sample Volunteer Forms

The following forms are used by the Atlanta Regional Commission, Area Agency on Aging, Atlanta, GA.

- Corporate Contact Form
- Agency Information Form
- Volunteer Information Form
- Volunteer Agreement Form
- Volunteer Monthly Report Form

CORPORATE CONTACT FORM

Name of Company	Product	Company President	Contact Person	Mission Statement	Volunteer Program CVC United Way Other Program	Flex Time	Annual Report

ATLANTA REGIONAL COMMISSION
AGING SERVICES CORPORATE VOLUNTEER PROGRAM
(404)364-2559

Agency Name _____ Telephone _____

Address _____

City _____ State _____ Zip _____

Services Offered _____

_____

Area Served _____

Volunteer Coordinator _____ Telephone _____

PLEASE DESCRIBE THE FOLLOWING VOLUNTEER OPPORTUNITIES AVAILABLE WITH YOUR AGENCY. INDICATE DATES, TIMES, LENGTH OF COMMITMENT AND NUMBER OF VOLUNTEERS NEEDED:

Home Delivered Meals _____

_____

Transportation _____

_____

Friendly Visiting _____

_____

Yardwork/Home Repair _____

_____

Individual Projects _____

_____

Group Projects _____

_____

Senior Centers _____

_____

Board Membership _____

_____

Agency Technical Assistance _____

_____

Other (Please Describe) _____

_____

Does your agency have volunteer insurance coverage? _____

AGING SERVICES CORPORATE VOLUNTEER PROGRAM

VOLUNTEER INFORMATION FORM

Atlanta Regional Commission
3715 Northside Parkway
200 Northcreek, Suite 300
Atlanta, GA 30327
(404)364-2559

Date_____

Name_____

Home address_____ City_____ Zip_____ County_____

Home phone_____ Business phone_____

Age Group: Under 18_____ 41-59_____ Sex_____
19 - 40 _____ 60+ _____

Employer's name & address_____

_____

Your position:_____

Special Skills/Training/Interests or Hobbies_____

_____

Describe your previous or present volunteer positions_____

_____

Describe any previous or present involvement with elderly individuals_____

_____

What kind of volunteer work are you most interested in?_____

_____

When are you available? Days:_____ Hours per month_____

In what geographic area are you interested in working?_____

Do you have any physical limitations?_____

Are you interested in providing transportation? Yes_____ No_____

Emergency contact: Name_____ Phone_____

Relationship_____

How did you learn about this program?_____

_____

References may be requested by the participating agency.

Please use the back of this form for any further comments or information you wish to share.

Date_____

VOLUNTEER AGREEMENT FORM

Volunteer's Name or Group Contact Person:_____

Employer_____ Phone (H)_____ (W)_____

Supervisor_____

Client's Name_____

Address_____

Extended Lunchtime Service	Date & Hours	Date & Hours	Date & Hours	Date & Hours	For Office Use
1. Friendly Visiting					
2. Meals on Wheels Delivery					
3. Senior Center Sponsorship					
4. Other					
Evening or Weekend Service					
1. Transportation					
Grocery Shopping					
Escort/Errands					
Medical Appointments					
Other					
2. In-Home Assistance					
Housekeeping					
Budget and Bill Paying					
Yardwork					
Minor Home Repairs					
Meal Preparation					
Letter Writing					
Other					

Group or Individual Project (circle one) Expected Length of Commitment_____

I agree to the above plan and have been informed of the training sessions and reporting procedures involved in my volunteer service:

_____
Volunteer Signature and Date

_____
Client Signature and Date

_____
Volunteer Supervisor Signature and Date

AGING SERVICES CORPORATE VOLUNTEER PROGRAM

Atlanta Regional Commission
3715 Northside Parkway
200 Northcreek, Suite 300
Atlanta, GA 30327
(404)364-2559

Volunteer Monthly Report

Month____ Year____

Name_____ Phone_____

Address_____

Employer_____

Client_____

Extended Lunchtime Service	Date & Hours	Date & Hours	Date & Hours	Date & Hours	For Office Use
1. Friendly Visiting					
2. Meals on Wheels Delivery					
3. Senior Center Sponsorship					
4. Other					
Evening or Weekend Service					
1. Transportation					
Grocery Shopping					
Escort/Errands					
Medical Appointments					
Other					
2. In-Home Assistance					
Housekeeping					
Budget and Bill Paying					
Yardwork					
Minor Home Repairs					
Meal Preparation					
Letter Writing					
Other					

Are there any comments or information you would like to share about the client or your volunteer service?

_____

_____

_____

_____

Washington Business Group on Health
National Eldercare Institute on Business and Aging
777 North Capitol Street, NE, Suite 800 • Washington, DC 20002
202/408-9320 • TDD 202/408-9333 • FAX 202/408-9332

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